PRAGMASYS CONSULTING LLP

PRAGMA AUTONUMBERING

USER GUIDE

Contents

1. Pragma-Auto Numbering

1.1 Introduction

Every business needs to generate unique auto-number for their Transactional, Master or Configuration records. This auto-number is a unique number or string which is referred to by the System Users throughout the business life cycle.

The challenge for CRM systems is to generate a unique number for each record in an entity under heavy load across multiple servers and environment via multiple access points, especially in the CRM Online environment.

Pragma-Autonumbering solution generates incremental numeric counter for each record automatically. The increment can be set to unity or a user defined pattern, depending on the business need.

1.2 Pragma-Auto Numbering

Using the ability of Dynamics CRM plugins to execute within the database transaction, Pragma-Auto Numbering can generate unique number sequence regardless of load and across multiple CRM servers by leveraging the transactional locking behavior of SQL Server, purely within the context of Microsoft Dynamics CRM.

1.3 Salient Features

Following are the salient features of Pragma-Autonumbering solution:

- Works for 'Out of the Box' entities as well for 'Custom' entities
- Able to create auto numbering using Prefix, Suffix and Zero Pads
- Reset Auto Number Daily, Weekly, Monthly, Yearly
- Able to add Constant Prefix or Variable Prefix
- Provision to Business users to configure "Auto number". It reduces dependency on IT department.
- Reduces service calls to IT & Administration Team

2. Pragma-Auto Numbering Solution

2.1 Pre-requisites to create Auto Numbering records

i. Pragma-Auto-Numbering solution to installed from Microsoft Appsource
ii. User should have the appropriate Security Role i.e "Pragma Auto Numbering Admin" or "System Administrator"

2.2 Navigating to Autonumbering App

i. On installing the Autonumbering app in your Dynamic instance,
    a. Pragma-Auto Numbering app will be visible in the 'My Apps' section
    b. New security role with name "Pagma Auto number Admin" would be created.
ii. Users who have the "System Administrator" or "Pragma Auto Number Admin" security role can access "Pragma Auto numbering" app
iii. On the Dynamics 365 Home page, click on the 'Pragma-Auto Numbering' app
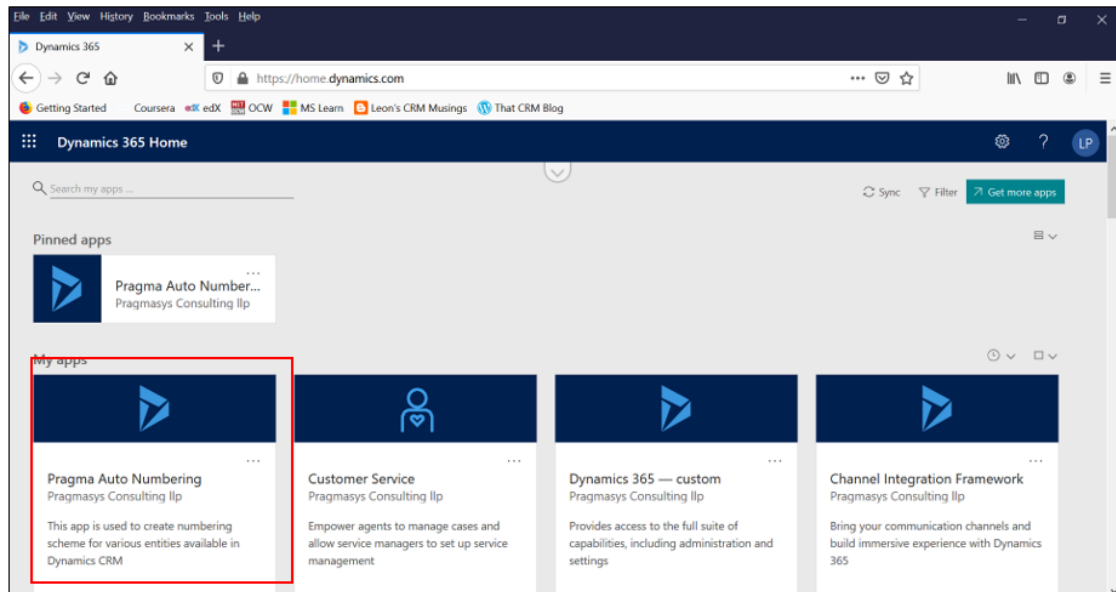
2.3 Creating Autonumbering Record on Leads

2.3.1 Steps to create Auto Numbering record

i.   In the below example, we will see the step-by-step process to set up 'Auto-numbering' on *Leads* entity

ii.   On click of 'Pragma-Autonumbering' app, the numbering schemes page would open as shown below:
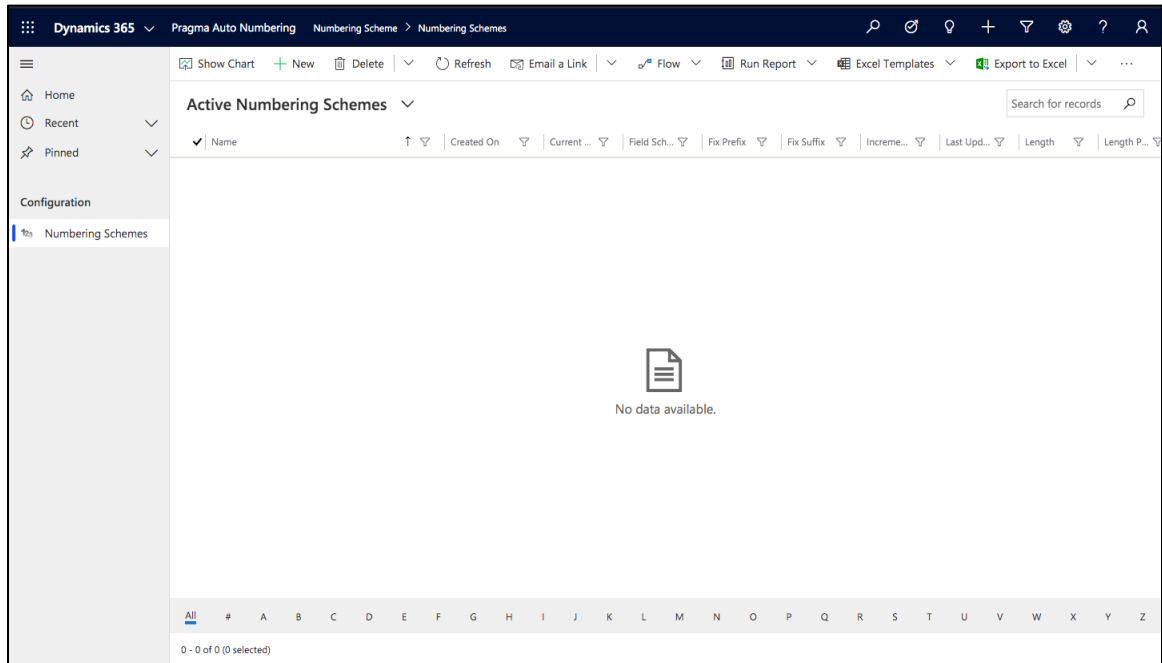
iii.   Click on '+New' icon, to create a new 'Numbering Series' record.
Click on 'Select Entity' dropdown to view the list of entities available for setting an auto-numbering series.
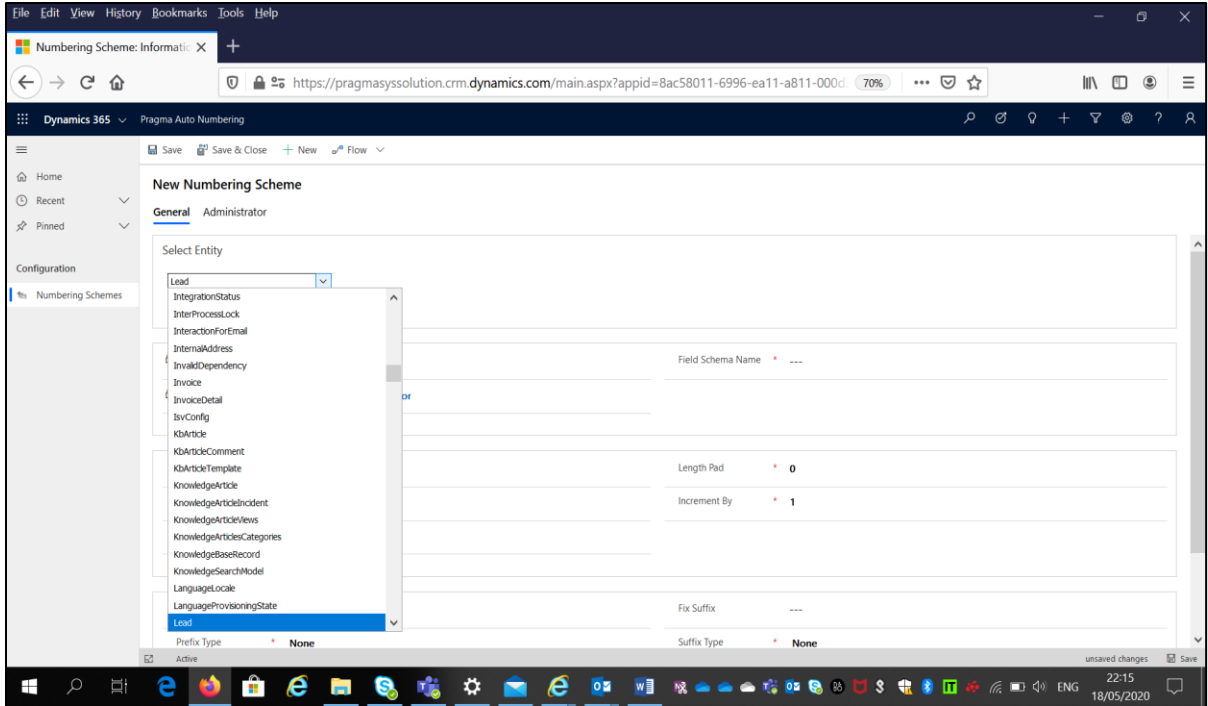
iv.   On selecting an entity name, it is displayed in 'Entity Name' field.
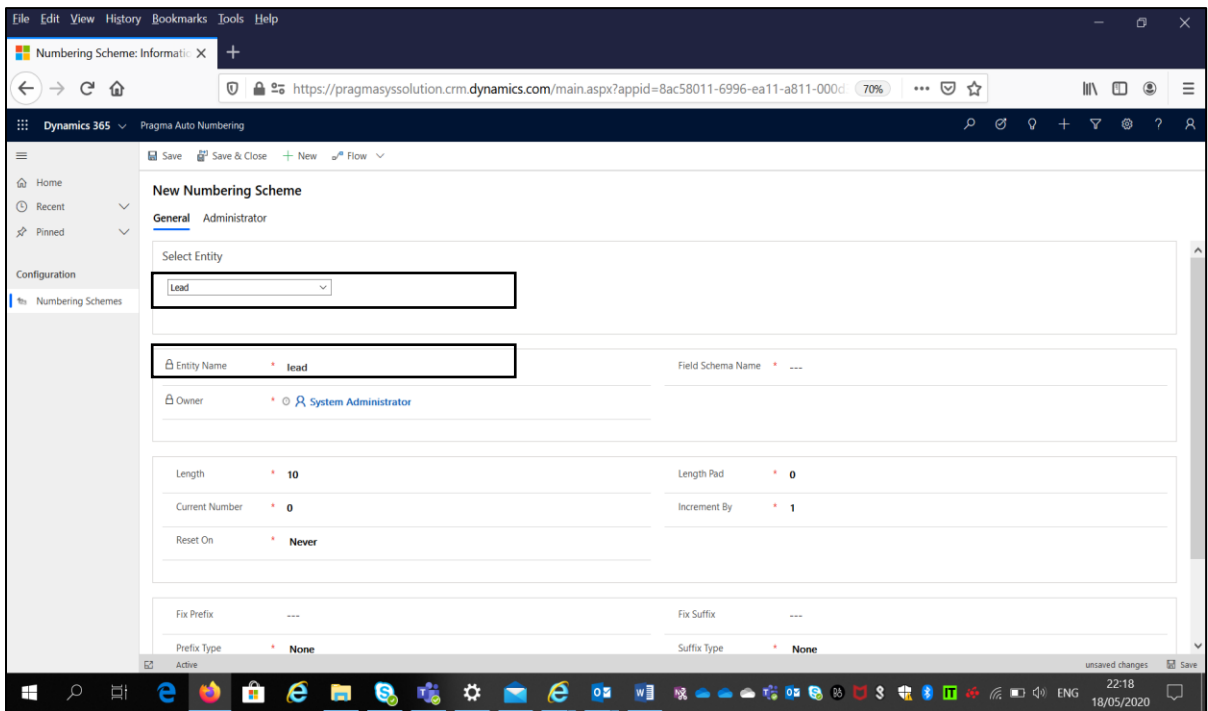
v.   Fill in the data in the other fields respectively.

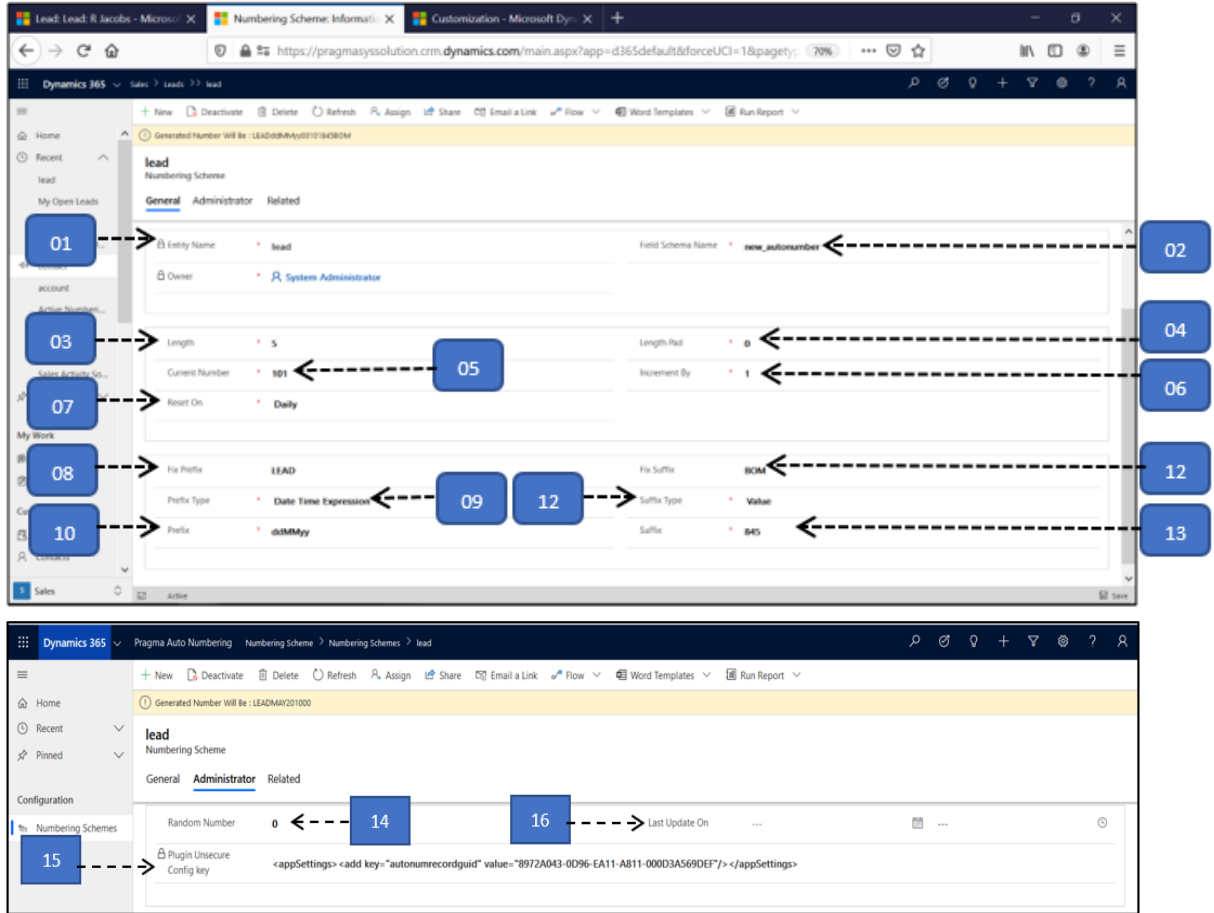**Screenshot #1** : Setting an auto-number on Leads Entity
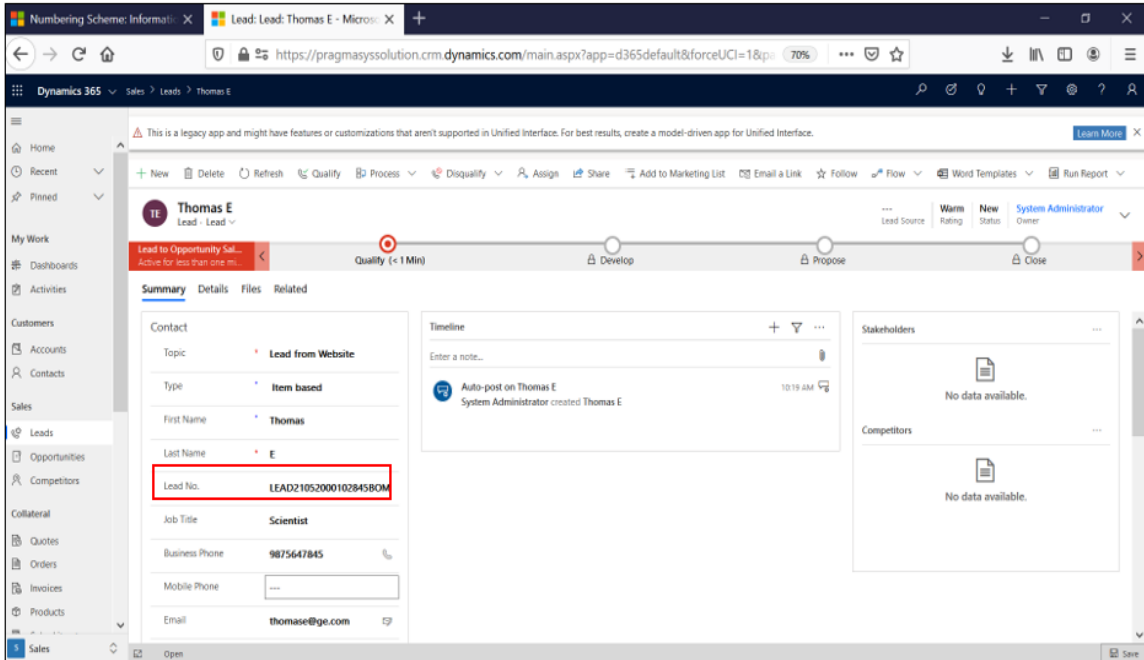

Table with Field Description:

No.	Field Name	Description
1.	Entity Name	The logical name of the entity on which Auto Number to be configured. In the example above, it is set to 'Leads'.
2.	Attribute Name	Enter the logical name of Attribute where auto-number to be updated. This refers to the particular field on the Entity chosen. In the above example, it is set to 'Description' field on Leads entity.

3.	Length	Length of auto number, excluding suffix and prefix.
4.	Length Pad	Enter character to be used for padding, if length of number is less the expected length.
5.	Current Number	The number from which the numbering series is set to begin by adding the incremental value specified. For eg: We have set the 'Current Number' to be 1000 and 'Increment By' to 1, so the numbering series would be set as 1001.
6.	Increment By	The numeric value by which the sequence needs to be incremented on every iteration.
7.	Reset On	This will reset the auto number to the Current Number as per the specified frequency. 1. **Never:** Do not reset number. 2. **Daily**: Reset Number Daily. 3. **Monthly:** Reset Number Monthly. 4. **Yearly:** Reset Number Yearly. For eg : If the Numbering Record is created on 01st April 2020, then the number would be reset on 01st April 2021.
8.	Fix Prefix	This value would be set as the constant or a permanent prefix. In the above example, Fix Prefix is set to 'Lead'; therefore 'Lead' will be appended to the Numbering Series in every iteration.
9.	Prefix Type	This value would be set as the variable prefix. Users may want to add a ***'dd-mm-yyyy'*** value to the Numbering Series for identifying the date on which the particular record is created. In such a case they can select 'Date Time Expression' value. Select the type of prefix to append on. 1. **None**: Default value selected, for this value, the value will be blank in the suffix /prefix. 2. **Value**: String would be appended as prefix to Numbering Series 3. **Date Time Expression**: Date Time values in form of expression, will be equated and appended to the Numbering Series. **Note** : Please refer 'Appendix' to view the list of supported date-time expressions.
10.	Prefix	Depending on the value selected in 'Prefix Type' field, appropriate value should be entered in 'Prefix' field.

		• If the 'Prefix Type' field is set to None, no value is needed • If the 'Prefix Type' field is set to Value, text string has to be specified • If the 'Prefix Type' field is set to Date Time Expression, enter Date Time Expression.
11.	Fix Suffix	This value would be set as the constant or a permanent suffix.
12.	Suffix Type	This value would be set as the variable Suffix. Users may want to add a *'dd-mm-yyyy'* value to the Numbering Series for identifying the date on which the record is created. In such a case they can select 'Date Time Expression' value. Select the type of Suffix to append on. 1. **None**: Default value selected, for this value, the value will be blank in the suffix. 2. **Value**: String would be appended as suffix to Numbering Series 3. **Date Time Expression**: Date Time values in form of expression, will be equated and appended to the Numbering Series. **Note** : Please refer 'Appendix' to view the list of supported date-time expressions.
13.	Suffix	Depending on the value selected in 'Suffix Type' field, appropriate value should be entered in 'Suffix field. • If the 'Suffix Type' field is set to None, no value is needed • If the 'Suffix Type' field is set to Value, text string has to be specified • If the 'Suffix Type' field is set to Date Time Expression, enter Date-Time Expression.
14.	Random Number	* For admin use only.
15.	Plugin Unsecure configuration Key	This is read only field, for internal purposes.
16.	Last Update On	* For admin use only.
17.	Generated Key	This message shows the format of the auto generated numbering series.

2.3.2   Numbering Series on Leads

i.   Auto-numbering as specified has been generated and added to the '**Lead No.'** field:

3. Appendix

3.1 Supported Date-Time Expressions